

Customer Satisfaction Survey: Job Aid

Purpose and Scope of this Document

This document includes key information and process guidance about the State Health Insurance Assistance Program (SHIP) Customer Satisfaction Survey. The primary audience of this document includes SHIP Directors and SHIP counselors. The purpose of this document is to explain the survey process clearly, to prevent errors, to ensure consistency, and to identify survey roles and responsibilities.

Survey Overview

Survey Title

The title of this survey is the **State Health Insurance Assistance Program (SHIP) Customer Satisfaction Survey**.

Survey Purpose

This effort is part of the SHIP network's commitment to provide the best possible service to beneficiaries. The purpose of the survey is to measure satisfaction with SHIP Medicare counseling services, to assess how customers value the services and information they receive, to identify opportunities for continuous improvement, and to comply with regulatory requirements regarding data collection and continuous improvement.

Survey Format and Participants

The SHIP Customer Satisfaction Survey is a **phone bank survey** designed to gather input from **individuals who receive SHIP counseling**.

As a phone survey, we can only survey individuals (1) who we can reach by phone and (2) who are interested in participating. To be considered as a *potential survey candidate*, an individual must:

- ☐ Be a recent recipient of SHIP Medicare counseling services, and
- ☐ Have a corresponding record in the SHIP National Performance Reporting (NPR) system that includes a complete **first name, last name, and valid phone number**.

To participate in the survey, a *potential survey candidate* must:

- ☐ Answer the phone,
- ☐ Agree to take the survey, and
- ☐ Be able to recall the general timeframe and topic of the counseling session.

State/Territory Participation

Each year, ACL will send individual notifications to the states/territories participating in that specific year of the survey. In each year of the survey, 18 SHIPs will participate, with each of the 54 states/territories participating in one of the three survey years.

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Survey Timing

Clearance for the SHIP Customer Satisfaction Survey was received on August 31, 2017 from the Office of Management and Budget and does not expire until August 31, 2020. Administration of the survey will begin in the fall of 2017, which is Year 1 of the survey, and conclude in March of 2018. In Year 2 of the survey, survey administration will begin in late 2018 and conclude in early 2019. In Year 3 of the survey, survey administration will begin in late 2019 and conclude in early 2020. State/territory level results will be available after the conclusion of the survey administration periods. Final reporting and analysis at the national level will be available in 2020.

The SHIP Customer Satisfaction Survey will have **two administration periods in each of its three years**. For each year:

1. One survey administration period will occur during the annual Medicare Open Enrollment Period (“OEP survey period”), and
2. The other survey administration period will occur outside of OEP (“non-OEP survey period”).

For Year 1, the OEP survey period will occur between Monday, October 30th, 2017, and Wednesday, November 22nd, 2017. Please review the Survey Year 1 Timing Details section to understand timing details and process requirements for this survey. ACL will finalize and communicate the non-OEP survey administration period by January 2018.

Survey administration periods for survey Years 2 and 3 have not yet been finalized.

Survey Response Target

The goal for each state/territory is to collect a total of 75 survey responses. About half of the survey responses (i.e., 38 responses) will be collected during the *OEP survey administration period*. The remaining half (i.e., 37 responses) will be collected during the *non-OEP survey administration period*.

Survey Roles and Responsibilities

The following table outlines roles and responsibilities in regards to the SHIP Customer Satisfaction Survey.

Role	Responsibilities
Administration for Community Living (ACL) Headquarters (HQ)	<ul style="list-style-type: none"> • Provide oversight over survey process • Maintain training materials • Communicate and escalate, as necessary, issues that arise during survey process • Review survey reports and share with states/territories
ACL Project Officers	<ul style="list-style-type: none"> • Serve as direct points-of-contact (POCs) for SHIP Directors

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Role	Responsibilities
CG Strategy (CGS)	<ul style="list-style-type: none"> • Create phone bank survey instrument • Develop and present all survey training materials • Address questions regarding survey preparation and/or administration sent to CGS at SurveySupport@cgstrategy.com • Serve as primary POC for survey training, technical assistance, data collection, and analysis • Pull counseling session data using National Performance Reporting (NPR) system to identify potential survey candidates • Provide list of potential survey candidates to phone bank • Track survey response rates and provide regular status updates on progress • Analyze and report on survey results
Information Alliance (phone bank)	<ul style="list-style-type: none"> • Contact potential survey respondents and conduct phone survey • Provide phone survey results to CGS
SHIP Counselors	<ul style="list-style-type: none"> • Understand when and how to notify counselees that they may be contacted to participate in the survey* • Conduct counseling sessions • Enter counseling session data into NPR** <p>*Note: While counselors will perform a critical role in notifying potential participants about the survey, they are not expected to have knowledge of statistical procedures or specific knowledge of the SHIP Customer Satisfaction Survey beyond what is provided in this job aid.</p> <p>**Note: One exception to this is in the case where the standard process for your state/territory is that someone other than the Counselor enters counseling session data into NPR. For the purposes of this survey, it is not critical who enters the data into NPR, but it is critical that it <i>is entered into NPR</i> in a timely fashion.</p>
SHIP Coordinators	<ul style="list-style-type: none"> • Prepare SHIP staff and volunteers for survey administration periods • Ensure necessary data is entered into NPR during the survey administration periods <p>Note: This role only applies to SHIPs that use Coordinators or Coordinator-type roles. For states/territories that do not use Coordinators, the SHIP Director will assume the listed responsibilities.</p>

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Role	Responsibilities
SHIP Directors	<ul style="list-style-type: none">• Prepare SHIP staff and volunteers for survey administration periods• Ensure necessary data is entered into NPR during the survey administration periods• Interact with CGS to manage response rates and coordinate counselor communication about the survey to SHIP customers / counselees

Key Points of Contact

State

For specific questions about your state or territory's survey, your first point of contact should be the Director of your state/territory's program. If there are questions that your Director cannot answer you should contact individuals associated with ACL or the contractor (CG Strategy) responsible for managing this survey project (see below).

ACL

For questions about the purpose or use of this survey, contact:

- Katie Glendening (Katherine.Glendening@acl.hhs.gov)

Survey Support Contacts

For questions about the survey tool or detailed process questions, contact:

- CG Strategy (CGS): David Spak or Hunter Gray
 - Email: Surveysupport@cgstrategy.com
 - Phone: 703-527-7001

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Survey Preparation

In order to prepare for administering the survey, SHIP Directors should identify key personnel to review survey materials, including training resources posted to the SHIP TA Center (<https://www.shiptacenter.org/resource-library/>).

In addition, SHIP Directors can contact contractor support staff from CG Strategy at any time. Questions or requests should be sent to SurveySupport@cgstrategy.com. A response will be sent within one business day of the original request.

Survey Administration Activities

For the SHIP Customer Satisfaction Survey, all administration periods include the same core activities:

1. SHIP counselors conduct counseling sessions and notify counselees that they may be contacted to participate in a customer satisfaction survey.
2. SHIP counselors¹ **enter counseling session data (first name, last name, and phone number) into NPR no later than one week after the date of the session.**
3. CGS pulls counseling session data from NPR, checks data for required elements, and sends a list of potential survey respondents to the phone bank.
4. Phone bank conducts phone survey and provides results to CGS.
5. CGS monitors survey response results and coordinates with states/territories until enough responses have been collected.

¹ Or other relevant staff/volunteers, in instances where counselors don't enter data into NPR.

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Survey Administration Period Expectations

In order for this survey to be successful, there are several specific requirements SHIPs will be expected to adhere to during a survey administration period:

- ❖ **All counseling sessions are documented and entered into NPR no later than one week after the session date.**
- ❖ **All counseling session records include counselee first name, last name, and phone number.**
- ❖ **Counselors notify counsees about the survey at the end of the counseling session, using the sample language provided in the orange box below as a guide.**

Note that these requirements only apply during the two survey administration periods for your SHIP. At most, your SHIP will only have to collect and input this additional information for one OEP survey period (2-3 weeks) and one non-OEP survey period (2-3 weeks).

Survey Administration Period - Sample Script for Counselors

For counseling sessions occurring during a survey administration period, counselors should read the following message (i.e., everything inside the orange box). Note that some text has been highlighted in yellow, which should be updated to match the specifics of the counseling session.

Thanks for **visiting/contacting** **<insert SHIP program/office name>** today. I hope the information I've provided has been helpful. My agency is currently conducting a customer satisfaction survey, so you might get a phone call in the next week or two asking about your satisfaction with the help you've received today.

If you're contacted, you'll only be asked about your experience with this counseling session and won't have to provide any sensitive personal information. The caller will also give you an "OMB Control Number" (0985-0057 – provide only if asked), which will let you know that it's a legitimate survey.

Thanks again for contacting us and please let us know if you need additional assistance.

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Survey Year 1 Timing Details

OEP Survey Administration Period

For Year 1, the OEP administration period will occur between Monday, October 30th, 2017, and Wednesday, November, 22nd, 2017. Note that the OEP survey administration period includes both the time to conduct counseling sessions for the survey (blue column) and the time to enter the data into NPR, up to one week after the counseling sessions (orange column).

States/territories will need to notify counselees about the survey at the end of all counseling sessions that occur on a date in the blue column, October 30th through November 17th. Counselors will also need to enter data (including first name, last name, and phone number) for the counseling sessions that occur on these blue dates. In addition, all counseling records should be entered into NPR within one week, with all records for October 30th through November 17th entered into NPR by November 22nd at the latest.

(NOTE: the final two days of counseling in the OPE period – November 16th and 17th – are technically due on Thanksgiving Day and the day after. As a result, you will have extra time to get these records into the system.)

Table 1. Survey Year 1, OEP Survey Administration Period, Counseling Session Dates and NPR Entry

Counseling Session Occurs on (Date)	Weekday	Counseling Session Data Entered in NPR by No Later Than
10/30/2017	Monday	11/6/2017
10/31/2017	Tuesday	11/7/2017
11/1/2017	Wednesday	11/8/2017
11/2/2017	Thursday	11/9/2017
11/3/2017	Friday	11/10/2017
11/4/2017	Saturday	11/11/2017
11/6/2017	Monday	11/13/2017
11/7/2017	Tuesday	11/14/2017
11/8/2017	Wednesday	11/15/2017
11/9/2017	Thursday	11/16/2017
11/10/2017	Friday	11/17/2017
11/11/2017	Saturday	11/18/2017
11/13/2017	Monday	11/20/2017
11/14/2017	Tuesday	11/21/2017
11/15/2017	Wednesday	11/22/2017
11/16/2017	Thursday	11/27/2017
11/17/2017	Friday	11/27/2017

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Non-OEP Survey Administration Period

ACL will finalize and communicate the dates for the non-OEP survey administration period by January 2018.

Survey Years 2 and 3 Timing Details

Survey administration periods for survey Years 2 and 3 have not yet been finalized.